MSN Global
Medical Billing & RCM

Eligibility & Benefits Verification Checklist

Document core insurance eligibility and benefit information before service.

Patient _____	**Payer** _____
DOS / Planned Service _____	**Verified By** _____

Member & Coverage

- ■ Member ID and group number verified.
- ■ Coverage active for date of service.
- ■ Plan type / network identified.
- ■ Primary / secondary coverage and COB status reviewed.

Benefits

- ■ Deductible total and remaining amount documented.
- ■ Copay documented.
- ■ Coinsurance documented.
- ■ Out-of-pocket maximum and remaining amount documented.
- ■ Relevant service-specific benefit limitations reviewed.

Provider / Service

- ■ Rendering provider / facility network status checked when applicable.
- ■ Referral requirement checked.
- ■ Prior authorization requirement checked.
- ■ Visit limits / frequency limits checked.
- ■ Coverage exclusions or special benefit rules noted.

Verification Record

- ■ Verification date and source recorded.
- ■ Representative name / call reference number recorded when applicable.
- ■ Portal screenshot / confirmation retained according to practice policy.
- ■ Patient estimate / financial communication updated as appropriate.